

Purpose

This SOP is intended to outline the process for starting a claim or log interaction.

Teams Impacted

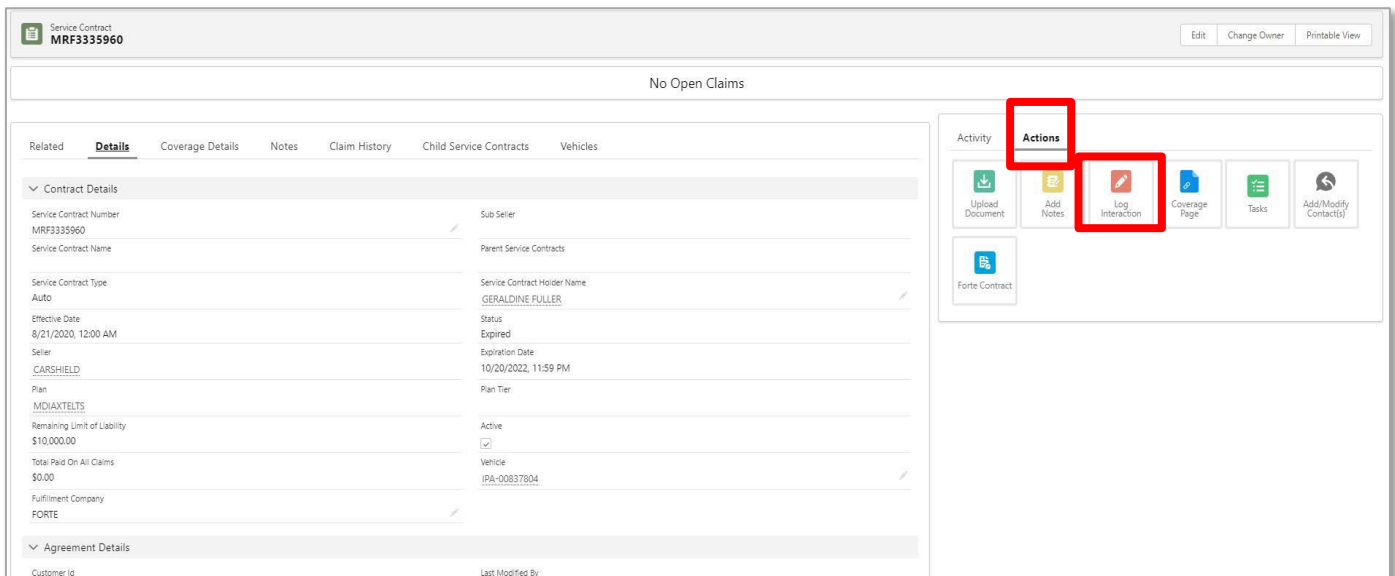
- Claims Support
- General Claims
- Technical Claims
- Customer service

Related References and Documents

- Forte.com
- NADA.com
- SOP: Finalizing Claims and Interactions.
- SOP: Parts Verification.
- SOP: Labor Hour verification.

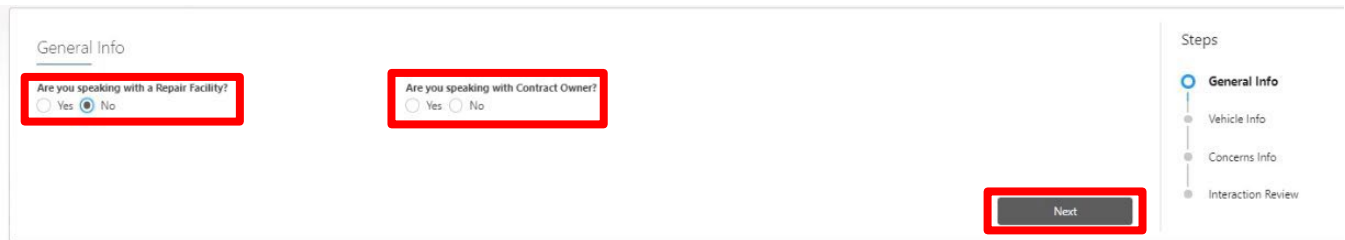
Procedure

1. After following the **Contract Holder Verification SOP** and having the contract pulled up you will need to click the **Actions** tab, claim Log interaction.



The screenshot displays the 'Service Contract' page for contract number MRF3335960. The interface includes a top navigation bar with 'Edit', 'Change Owner', and 'Printable View' options. Below the contract number, it states 'No Open Claims'. The main content area is divided into two sections: 'Details' and 'Actions'. The 'Details' section is expanded, showing contract information such as 'Service Contract Number', 'Service Contract Name', 'Service Contract Type', 'Effective Date', 'Seller', 'Plan', 'Remaining Limit of Liability', 'Total Paid On All Claims', 'Fulfillment Company', 'Sub Seller', 'Parent Service Contracts', 'Service Contract Holder Name', 'Status', 'Expiration Date', 'Plan Tier', 'Active', and 'Vehicle'. The 'Actions' section is also expanded, showing a grid of buttons: 'Upload Document', 'Add Notes', 'Log Interaction' (highlighted with a red box), 'Coverage Page', 'Tasks', 'Add/Modify Contacts', and 'Forte Contract'.

2. The General Information screen will populate, prompting the first set of questions “Are you speaking with the Repair Facility?”
 - a. Select the **YES** radio button. Click **Next** continue to step 5.
 - b. If you select **NO**, you will be prompted “Are you speaking with the Contract Owner?”
 - i. After verifying caller select **Yes**, see Customer Service **SOP When and How to Start an Interaction**.



General Info

Are you speaking with a Repair Facility?
☐ Yes ☒ No

Are you speaking with Contract Owner?
☐ Yes ☐ No

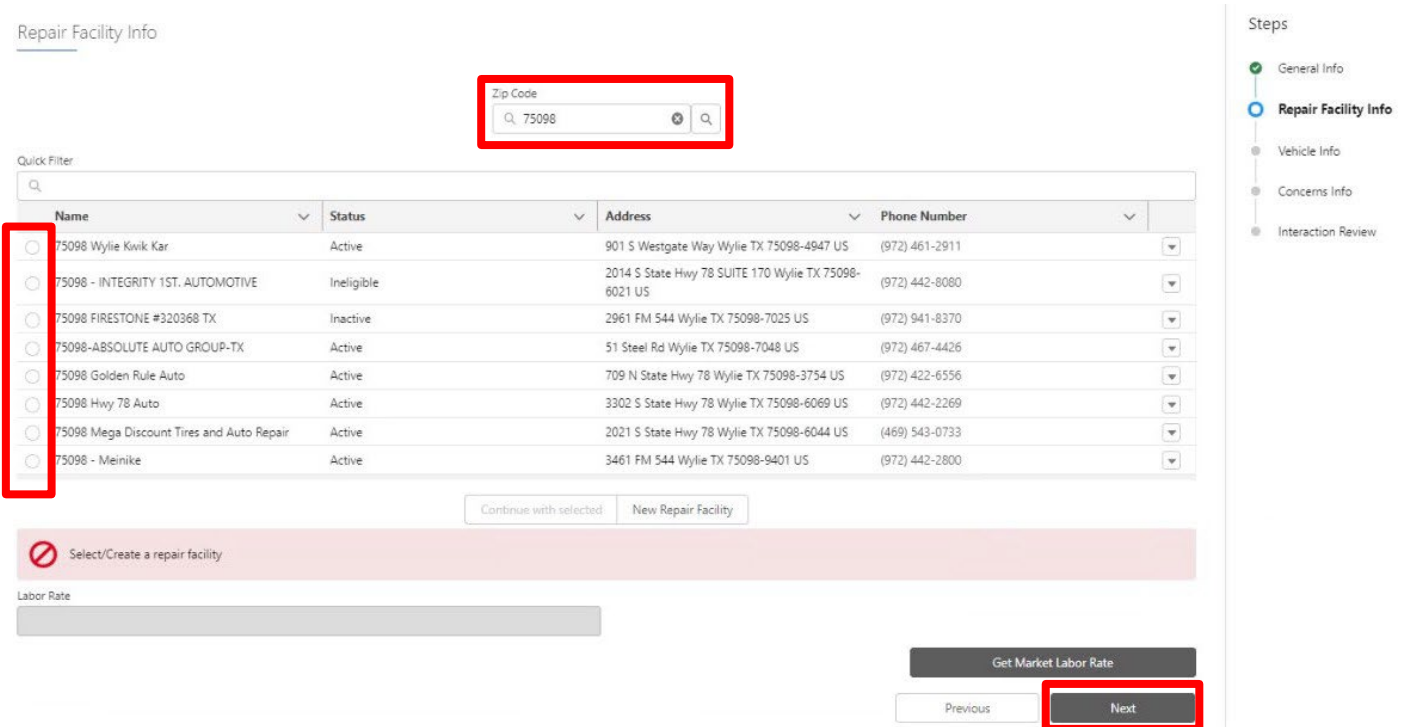
Next

Steps

- General Info
- Vehicle Info
- Concerns Info
- Interaction Review

3. Start search using Zip code of the shop, it will auto-populate shops in CMS.
 - a. If more than one shop search using Quick Filter box.
 - b. Verify select active shop calling.
 - c. Click **Next**

Note. Pay close attention to shop status if **Inactive** or **Ineligible** you will not be able to start a claim.



Repair Facility Info

Zip Code

Quick Filter

Name	Status	Address	Phone Number
<input checked="" type="radio"/> 75098 Wylie Kwik Kar	Active	901 S Westgate Way Wylie TX 75098-4947 US	(972) 461-2911
<input type="radio"/> 75098 - INTEGRITY 1ST. AUTOMOTIVE	Ineligible	2014 S State Hwy 78 SUITE 170 Wylie TX 75098-6021 US	(972) 442-8080
<input type="radio"/> 75098 FIRESTONE #320368 TX	Inactive	2961 FM 544 Wylie TX 75098-7025 US	(972) 941-8370
<input type="radio"/> 75098-ABSOLUTE AUTO GROUP-TX	Active	51 Steel Rd Wylie TX 75098-7048 US	(972) 467-4426
<input type="radio"/> 75098 Golden Rule Auto	Active	709 N State Hwy 78 Wylie TX 75098-3754 US	(972) 422-6556
<input type="radio"/> 75098 Hwy 78 Auto	Active	3302 S State Hwy 78 Wylie TX 75098-6069 US	(972) 442-2269
<input type="radio"/> 75098 Mega Discount Tires and Auto Repair	Active	2021 S State Hwy 78 Wylie TX 75098-6044 US	(469) 543-0733
<input type="radio"/> 75098 - Meinike	Active	3461 FM 544 Wylie TX 75098-9401 US	(972) 442-2800

Continue with selected New Repair Facility

Select/Create a repair facility

Labor Rate

Get Market Labor Rate

Previous Next

Steps

- General Info
- Repair Facility Info
- Vehicle Info
- Concerns Info
- Interaction Review

4. After selecting the Repair Facility, you must verify the following:
 - a. Basic Info Section
 - b. Other Info Section (Scroll Down)
 - c. Contact will pullup if we have worked with the shop before.
 - i. Select the Advisor calling in.
 - ii. If selected VERIFY email for requesting documents.
 1. If email is wrong, click **Action Arrow** to update.
 - d. No contact information
 - i. Click **New Contact**, fill in all information then click **Save**. (See Figure2)

Selected Repair Facility

Account Name

85712 PEP BOYS

Rename

Shipping Address

4491 E Speedway Blvd.
Tucson, AZ 85712-4625
US

Relocate

Basic Info

Phone

(520) 795-5993

Email

svcmngr0661@pepboys.com.invalid

Payment Method

CC By Email

Fax

N/A

Hours Of Operation

M-S//8-7

Fleet Number

Other Info

Contacts

Name	Title	Phone	Email	Act...
NATHAN RANSOM		(520) 795-5993	svcmngr0661@pepboys.com.invalid	<div> <div></div> <div>New Contact</div> </div>

Repair Facility Info

Vehicle Info

Concerns Info

Interaction Review

Figure 2.

New Contact

First Name

* Last Name

Title

Email

Phone

Account Name

85712 PEP BOYS

Cancel

Save

5. Click the **Next** button.

Repair Facility Info

Selected Repair Facility

Account Name: 85712 PEP BOYS Rename Shipping Address: 4491 E Speedway Blvd, Tucson, AZ 85712-4625, US Relocate

Basic Info

Phone: (520) 795-5993 Fax: N/A

Email: svcmmgr0661@pepboys.com.invalid Hours Of Operation: M-S/8-7

Payment Method: CC By Email Fleet Number:

Other Info

Contacts

Name	Title	Phone	Email	Act...
NATHAN RANDOM		(520) 795-5993	svcmmgr0661@pepboys.com.invalid	

New Contact

Back to Zip Search

Labor Rate:

Get Market Labor Rate

Previous **Next**

Steps

- General Info
- Repair Facility Info**
- Vehicle Info
- Concerns Info
- Interaction Review

6. This will bring you to the Vehicle Info screen and you will need to document the following:
- Current mileage.
 - Breakdown Date.
 - Manufacture warranty in Forte
 - Verify Vehicle is still at the Repair Facility.
 - Driven or towed in?
 - Was the shop able to Duplicate Problem?
 - Diagnoses Perform for each Duplicate Problem.

7. Click the **Next** button.

Vehicle Info

VIN: 1C4RJMB56FW610833 Vehicle Year: 2015

Vehicle Make: JEEP Vehicle Model: CHEROKEE (NOT GRAND)

General Questions

Current Mileage: 122365 Breakdown Date: 02-28-2022

Elapsed Miles (KM): 78089 Elapsed Time (days): 413

Manufacturer Warranty? ☐ Yes ☒ No

Car at Repair Facility? ☒ Yes ☐ No

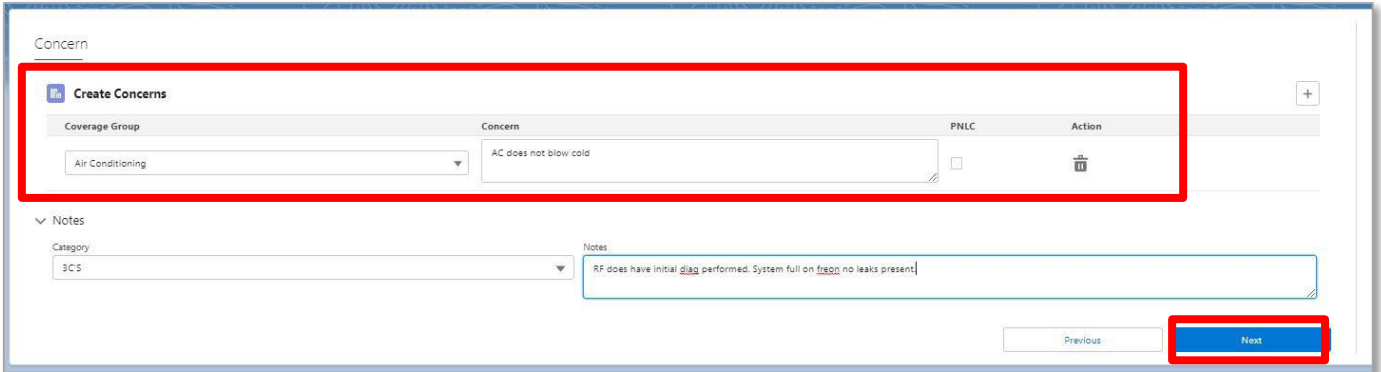
Driven or Towed In? ☒ Driven ☐ Towed In

Problem Duplicated? ☒ Yes ☐ No

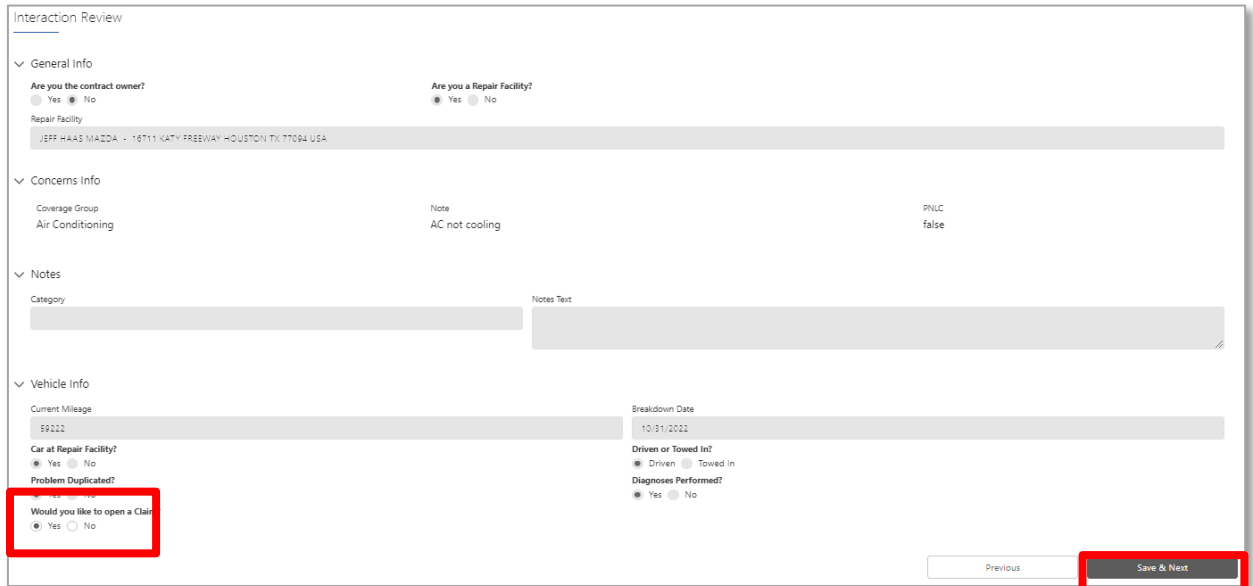
Diagnoses Performed? ☒ Yes ☐ No

Previous **Next**

8. Here you will be able to document all concerns and technician finds being called in from the Repair Facility.
9. Start with selecting the **Coverage Group menu**, then document the **Concern** for that failed group.
10. Click the **Next** button.



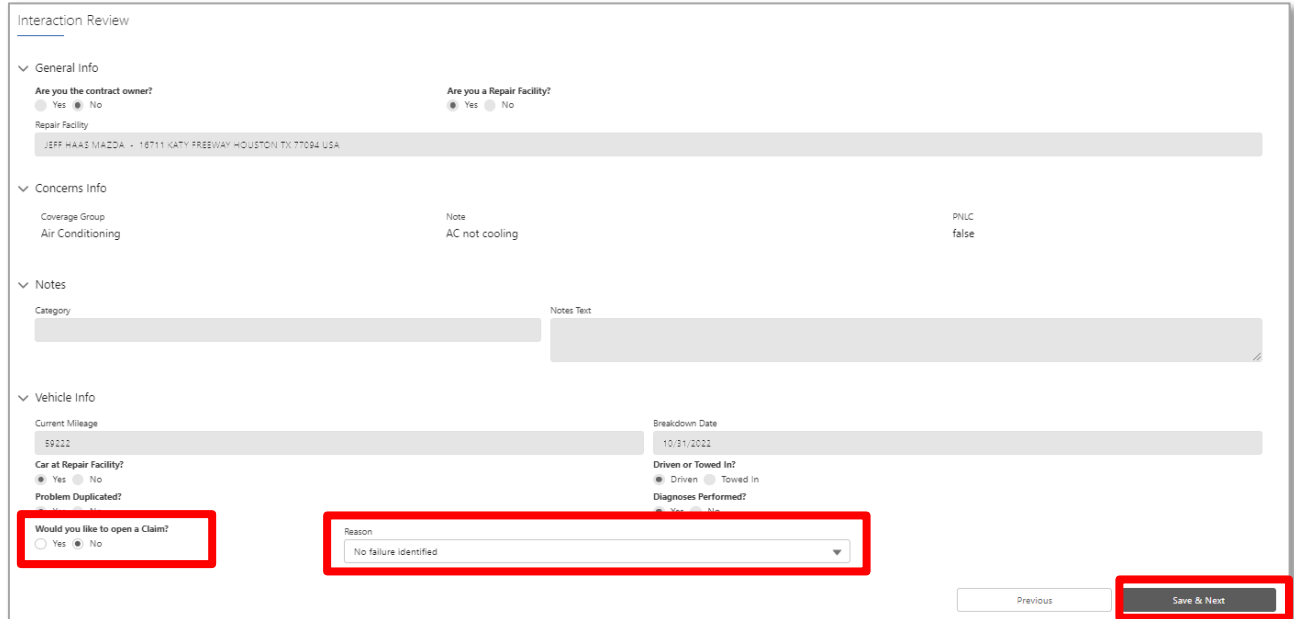
11. Review the detailed information entered and determine coverage.
 - a. If the part is listed for coverage, click the **Yes** radio button to start a claim.
12. Click the **Save and Next** button to continue to the next step.



13. If the **PART IS NOT LISTED** for coverage, select the **No** radio button to deny the claim.

14. Select PNLC from the drop-down menu and then click the **Save and Next button**.

Important! Any other reason why a claim will be **DENIED** a claim must be started and denied in **ESTIMATE** screen



Interaction Review

General Info

Are you the contract owner?
☐ Yes ☒ No

Are you a Repair Facility?
☒ Yes ☐ No

Repair Facility
 JEFF HAAS MAZDA - 16711 KATY FREEWAY HOUSTON TX 77094 USA

Concerns Info

Coverage Group
 Air Conditioning

Note
 AC not cooling

PNLC
 false

Notes

Category

Notes Text

Vehicle Info

Current Mileage
 59222

Breakdown Date
 10/21/2022

Car at Repair Facility?
☒ Yes ☐ No

Driven or Towed In?
☒ Driven ☐ Towed In

Problem Duplicated?
☐ Yes ☒ No

Diagnoses Performed?
☐ Yes ☒ No

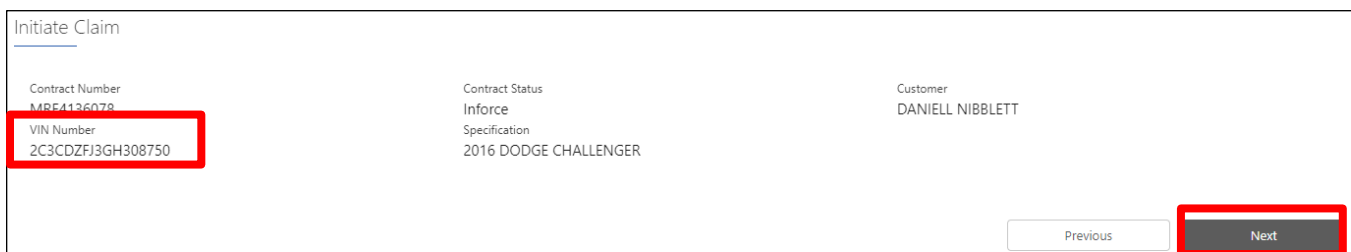
Would you like to open a Claim?
☐ Yes ☒ No

Reason
 No failure identified

Previous **Save & Next**

15. From the Initiate Claim screen, verify you are starting the claim in the right contract and then click the **Next** button.

a. Copy the Vin Number and start pasting into all sites needed to process the claim.



Initiate Claim

Contract Number
 MBE4136078

Contract Status
 Inforce

Customer
 DANIEL NIBBLETT

VIN Number
 2C3CDZFJ3GH308750

Specification
 2016 DODGE CHALLENGER

Previous **Next**

16. Make sure to verify:

- Repair order number
- Any Modifications to the vehicle.
- Signs of Commercial use.
- Signs of Collision Damage.
- Type of claim being called in.
- Ask RF for current labor rate.
- Ask if RF is willing to negotiate their labor rate. If so, update the labor rate in the CMS RF Profile & notate the change details.

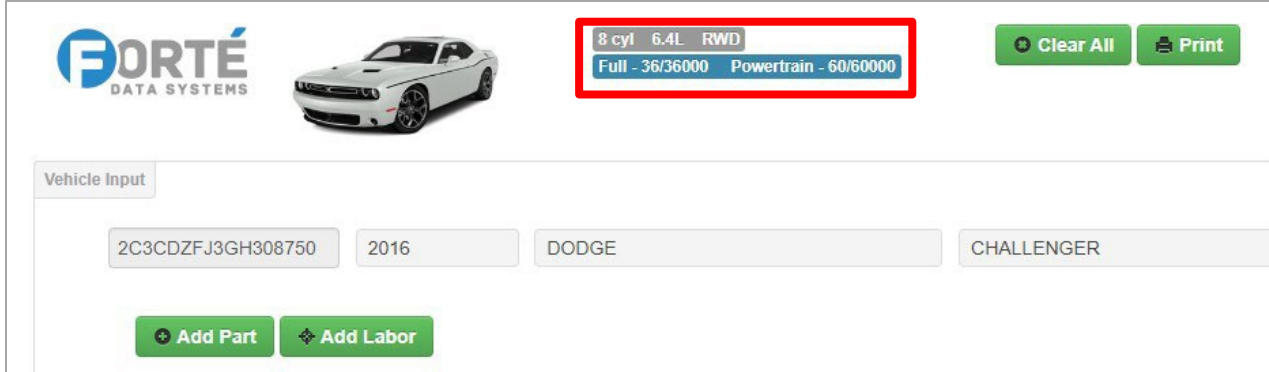
(Reference Job Aid: Updating Repair Facility)

Repair Order Number <input type="text" value="112525"/>	Modifications ? <input type="radio"/> Yes <input checked="" type="radio"/> No
Commercial Use ? <input type="radio"/> Yes <input checked="" type="radio"/> No	Collision ? <input type="radio"/> Yes <input checked="" type="radio"/> No
* Claim Type <input type="text" value="General"/>	
Driven or Towed In? <input checked="" type="radio"/> Driven <input type="radio"/> Towed In	
Do you want to add a new Contact? <input type="radio"/> Yes <input checked="" type="radio"/> No	

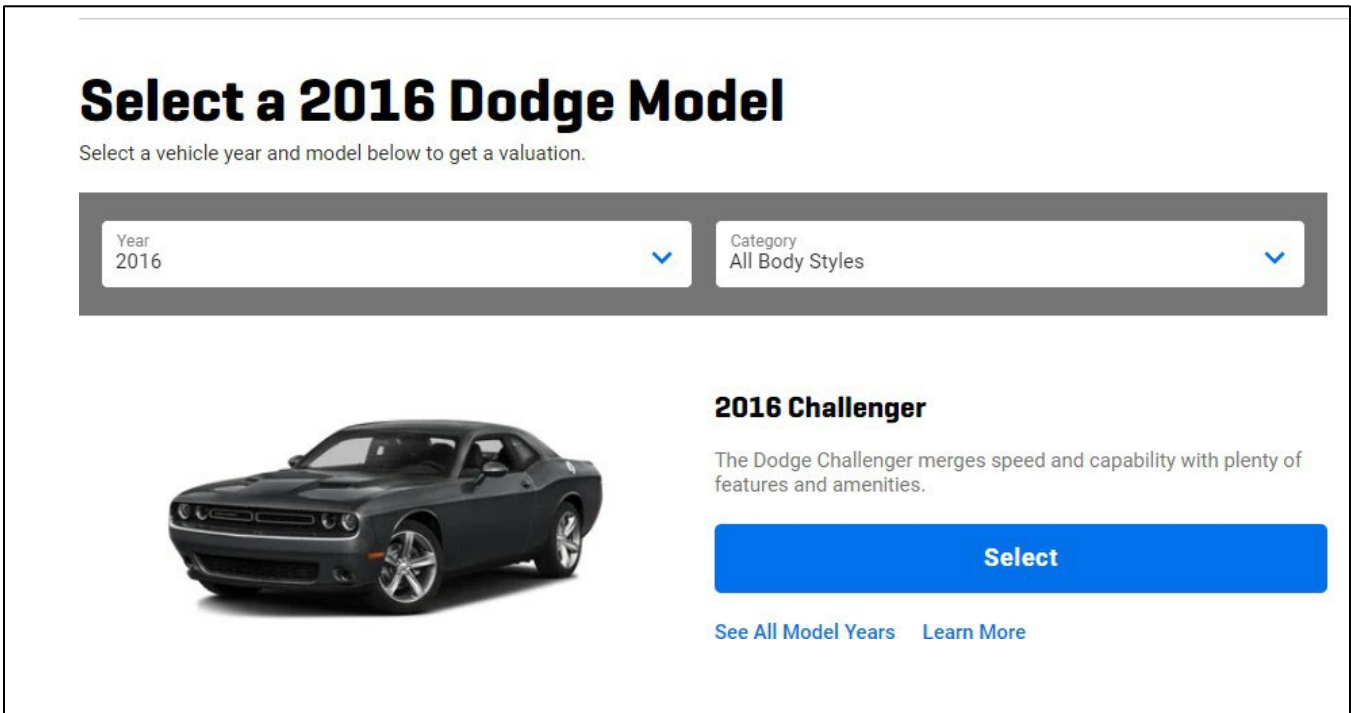
17. Enter *all* Repair Facility information and then click the **Next** button.

Repair Facility Name <input type="text" value="17148 - AAMCO Transmissions"/>		Phone <input type="text" value="2106596651"/>
Email <input type="text" value="aamcopatbooker@att.net.invalid.invalid"/>		Fax <input type="text"/>
* Repair Facility Type <input type="text" value="Independent"/>	Fleet Number <input type="text"/>	
* Hours Of Operation <input type="text" value="MF 8-6"/>	Warranty On Parts <input type="text" value="12/12"/>	
Warranty On Labor <input type="text" value="12/12"/>	Labor Manual Used <input type="text"/>	
Status <input type="text" value="Active"/>	Other Manual Used <input type="text" value="mitchell"/>	
* Payment Method <input type="text" value="CC By Email"/>	Labor Rate <input type="text" value="\$ 0.00"/>	
Tax Rate (Parts) <input type="text" value="8.25"/>	Tax Rate (Labor) <input type="text"/>	
Street <input type="text" value="2105 Pat Booker Road"/>	City <input type="text" value="Universal City"/>	
State/Province <input type="text" value="TX"/>	Zip/Postal Code <input type="text" value="78148"/>	
Country <input type="text" value="United States"/>		
Contacts <input type="text"/>		
First Name <input type="text"/>	Last Name <input type="text"/>	
Phone <input type="text"/>	Email <input type="text"/>	
<input type="button" value="Previous"/>		<input type="button" value="Next"/>

18. Verify, use www.forte.com
 - a. Basic Factory warranty (Full)
 - b. Powertrain Factory warranty



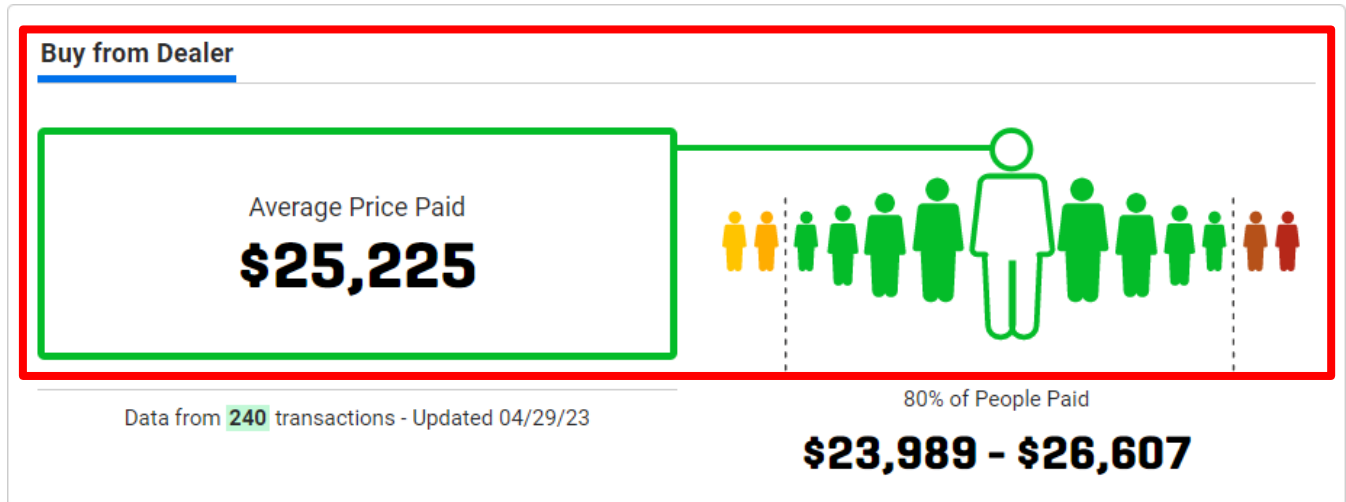
19. Use www.nada.com to verify vehicle value.
 - a. Click **Get a value.**
 - b. Click **Choose a Make.**
 - i. Select the year from the Year drop-down menu.
 - ii. Select the model.
 - iii. Verify trim as close as possible.
 - c. Enter the repair facility's zip code and then click the **Next** button.
 - d. Use the mileage reported by the repair facility.
 - i. Always use with standard equipment and click the **Next** button.



20. The NADA VALUE is listed for the claim.

21. Click the **Next** button.

- a. Must use Buy from Dealer value for NADA in CMS.



22. Enter all concerns reported by the repair facility and then click the **Next** button.

- a. Concern/s.
 - i. Customer complaint/s coming in.
- b. Cause of failure.
 - i. Detail diagnosis on how they verified point of failure/s.
- c. Failed component
 - i. Part/s being replace.

Create Concerns
+

Coverage Group	Concern	Cause of Failure	Failed Component	PNLC	Action
Drive Axle	clicking noise when turning	found the left from cv axle with excessive play in the inner joint.	Left front cv axle	<input type="checkbox"/>	

Previous

Next

23. Use the Claim Summary to verify all details have been entered in correctly and click the **Save Claim** button to generate a claim number.

- If there are no General repair concern/s, click **Reassign to Powertrain** box.
- Click the **Save Claim** button.

Repair Facility Info

Claim Number

2163039

Repair Facility Name

Driven or Towed In?

☒ Driven
 ☐ Towed In

Collision ?

☐ Yes
 ☒ No

Modifications ?

☐ Yes
 ☒ No

Commercial Use ?

☐ Yes
 ☒ No

Loss Details

Breakdown Date

2023-01-17

Current Mileage

110600

Basic Factory Warranty Years

3

Basic Factory Warranty Miles

36000

Power Factory Warranty Years

5

Power Factory Warranty Miles

60000

Concerns

Coverage Group	Concern	Component Failed	Cause of Failure	PNLC
Drive Axle	clicking noise when turning	Left front cv axle	found the left from cv axle with excessive play in false the inner joint. boot still in-tacked	

☐ Reassign to Powertrain

Previous

Save Claim

24. With a claim and claim number generated you can key in an estimate by using:

- SOP: Labor Hour verification.
- SOP: Parts Verification.
- SOP: Finalizing Claims and Interactions.

SOP: How to start a Claim or Log Interaction

Approval & Revision

Date Created 2/9/2022	Created By Johnnie Martinez	Date Approved 2/28/2022		Approved By Jason Dolan	
Date Revised 12/2/2022	Revised by Jesus Dominguez	Revision Description Updated to new CMS process		Date Approved 12/2/2022	Approved By Jason Dolan
Date Revised 4/27/2023	Revised by Johnnie Martinez	Revision Description Added steps up to the point of keying in estimate/ Formatting and grammar		Date Approved 4/27/2023	Approved By Chris Martin QA Kara Ness, L&D Jason Dolan, Claims
Date Revised 5/4/2023	Revised by Johnnie Martinez	Revision Description Updated NADA value to use		Date 5/8/2023	Approved By Jason Dolan
Date Revised 5/11/2023	Revised by Kara Ness	Revision Description Edited for format, grammar, and readability		Date Approved 5/11/2023	Approved By Kara Ness, L&D Kara Ness, QA
Date Revised 8/14/2023	Revised by Johnnie Martinez	Revision Description Updated new repair facility process to starting a claim		Date Approved 8/14/2023	Approved By Jason Dolan
Date Revised 05/02/2024	Revised by Gary Williams	Revision Description Added step under #16, Labor Rate Negotiation		Date Approved 05/03/2024	Approved By Jeremy Tan